



## 2022-2023 Change in Circumstances Request

Student Name: \_\_\_\_\_ PSU ID#: \_\_\_\_\_

Student Phone: \_\_\_\_\_ Student E-mail: \_\_\_\_\_

According to federal laws and regulations, a family’s 2020 income must be used on the 2022-2023 FAFSA to determine financial need for the school year. If the income on the FAFSA is not a true representation of your current situation or you have other family circumstances not reflected by your 2022-2023 FAFSA, a financial aid administrator may use your family’s estimated 2022 income to assess financial need.

**PLEASE NOTE:**

- All Sections of this worksheet must be completed and returned with ALL REQUIRED DOCUMENTATION before your change in circumstance request will be considered.
- A review of financial circumstances does not guarantee additional aid. Families should plan to cover bills based on the student’s original award.
- We will be required to review any and all documentation provided to our office, even if you choose at some point to withdraw your request.
- Previously awarded aid may be lost if inaccurate information was reported on the original FAFSA.

**SECTION 1:** Please summarize your change in circumstances below (attach additional sheets if necessary).

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**SECTION 2:** Please select which circumstance(s) apply to you. *Any documentation listed as required but not submitted will cause a delay in reviewing your request.* PSU reserves the right to request additional documentation not listed on this form. If you cannot check one of the boxes below please contact Student Financial Services for further assistance.

SELECT SPECIFIC CIRCUMSTANCE	REQUIRED DOCUMENTATION
<input type="checkbox"/> Change in or Loss of Employment for <b>Student/Spouse</b> . Loss must be incurred at least 10 weeks prior to requesting a review  Date of loss: _____	<ul style="list-style-type: none"> <li>• Dependent or Independent Verification Worksheet and student/spouse 2020 signed Tax Return(s) OR official IRS Tax Return Transcript(s)</li> <li>• Most recent student/spouse paystub showing year-to-date earnings (if income earned to date in 2022)</li> <li>• Documentation of severance package (if received)</li> <li>• Statement of unemployment benefits (if received)</li> <li>• Documentation confirming separation of service (if received)</li> <li>• <b>Complete SECTION 3 on page 3.</b></li> </ul>

SELECT SPECIFIC CIRCUMSTANCES	REQUIRED DOCUMENTATION
<input type="checkbox"/> Change in or Loss of Employment for <b>Parent(s)</b> . Loss must be incurred at least 10 weeks prior to requesting a review  Date of loss: _____	<ul style="list-style-type: none"> <li>• Dependent Verification Worksheet and parent/student 2020 signed Tax Return(s) OR official IRS Tax Return Transcript(s)</li> <li>• Most recent parent/spouse paystub showing year-to-date earnings (if income earned to date in 2022)</li> <li>• Documentation of severance package (if received)</li> <li>• Statement of unemployment benefits (if received)</li> <li>• Documentation confirming separation of service (if received)</li> <li>• <b>Complete SECTION 3 on page 3.</b></li> </ul>
<input type="checkbox"/> Divorce/Separation since filing of the 2022-2023 FAFSA  Date of Status Change: _____	<ul style="list-style-type: none"> <li>• Copy of divorce decree OR copy of legal separation documents</li> <li>• If no official documentation is available, a signed statement regarding separation and supporting documentation <i>from each spouse</i> of separate household such as copies of mortgage statements, leases, or utility bills (not cell phone) indicating different addresses.</li> <li>• Dependent or Independent Verification Worksheet</li> <li>• Parent 2020 signed Tax Return OR official IRS Tax Transcript</li> <li>• Parent 2020 W2(s) for <i>each spouse</i></li> <li>• <b>DO NOT complete SECTION 3</b></li> </ul>
<input type="checkbox"/> Death of a Parent/Spouse since filing of the 2022-2023 FAFSA  Date of Death: _____	<ul style="list-style-type: none"> <li>• Dependent or Independent Verification Worksheet</li> <li>• Parent 2020 signed Tax Return OR official IRS Tax Transcript</li> <li>• Parent 2020 W2(s) for <i>each spouse</i></li> <li>• Copy of Death Certificate</li> <li>• Statement of Survivor Benefits (if received)</li> <li>• <b>DO NOT complete SECTION 3</b></li> </ul>
<input type="checkbox"/> Loss or Reduction of Taxable/Untaxed Income <input type="checkbox"/> Child Support <input type="checkbox"/> Alimony <input type="checkbox"/> Worker's Compensation <input type="checkbox"/> Other: _____	<ul style="list-style-type: none"> <li>• Dependent or Independent Verification Worksheet and parent/student 2020 signed Tax Return(s) OR official IRS Tax Return Transcript(s)</li> <li>• 2022 most recent parent/student paystub showing year-to-date earnings (if income earned to date in 2022)</li> <li>• Documentation verifying effective date of loss or reduction</li> <li>• Documentation of reduced amount being received</li> <li>• <b>Complete SECTION 3 on page 3.</b></li> </ul>
<input type="checkbox"/> One-Time Income that will not be repeated: <input type="checkbox"/> Pension <input type="checkbox"/> IRA Distribution <input type="checkbox"/> 401K Withdrawal <input type="checkbox"/> Inheritance or Bonus	<ul style="list-style-type: none"> <li>• Dependent or Independent Verification Worksheet and parent/student 2020 signed Tax Return(s) OR official IRS Tax Return Transcript(s)</li> <li>• Documentation supporting one-time income (1099M, 1099R, etc)</li> <li>• <b>DO NOT complete SECTION 3</b></li> </ul>
<input type="checkbox"/> Unreimbursed, Out-of-Pocket Medical/Dental Expenses Incurred by Family	<ul style="list-style-type: none"> <li>• Dependent or Independent Verification Worksheet and parent/student 2020 signed Tax Return(s) OR official IRS Tax Return Transcript(s)</li> <li>• Provide a copy of Schedule A from the 2020 IRS Federal Tax Return showing documentation of out-of-pocket expenses.</li> <li>• <b>DO NOT complete SECTION 3</b></li> </ul>

**SECTION 3:** Complete the following 2022 Estimated Income Table.

If any section is NOT applicable, enter \$0 or NA. Do not leave any space blank.

EXPECTED 2022 INCOME	Student	Spouse	Parent 1	Parent 2
Gross 2021 income earned from work (wages, salaries, tips, net rental/business/farm income) <b>1/1/2022 through TODAY</b>	\$	\$	\$	\$
Expected 2021 income earned from work (wages, salaries, tips, net rental/business/farm income) <b>TODAY through 12/31/2022</b>	\$	\$	\$	\$
Severance Pay - Attach Documentation	\$	\$	\$	\$
Unemployment Benefits - Attach Documentation	\$	\$	\$	\$
Other taxable income (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains, etc.) Attach Documentation	\$	\$	\$	\$
Social Security Benefits	\$	\$	\$	\$
Life insurance or Death Benefits Received	\$	\$	\$	\$
Child Support received	\$	\$	\$	\$
Other Untaxed Income (pre-tax pension contributions, tax-exempt interest/dividends, worker's compensation, payments to IRA/Keogh, money received or paid on your behalf (i.e. bill/rent/mortgage) etc.)	\$	\$	\$	\$
<b>TOTAL EXPECTED 2022 INCOME</b>	\$	\$	\$	\$

**CAUTION:** Previously awarded aid may be lost if inaccurate information was reported on the original FAFSA. This may occur when families have reported "estimated" income and/or when families fail to report untaxed income (i.e. retirement funds not taxed for a current year.)

**CERTIFICATION:** I certify that the information provided on this form is true and complete to the best of my/our knowledge. It is understood that I/we are obligated to UPDATE any changes to the adjustments made in income, which, in turn, may modify the financial aid awarded. I understand that if I choose not to submit all documentation requested or fail to submit all documentation, a Change in Circumstances review will not be completed. However, I also understand PSU will be required to review any and all documentation previously provided to Student Financial Services and it may affect my aid.

**WARNING:** If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

Parent Signature *(Electronic signatures will not be accepted)* \_\_\_\_\_ Date: \_\_\_\_\_

Student Signature *(Electronic signatures will not be accepted)* \_\_\_\_\_ Date: \_\_\_\_\_

**Student Financial Services, 17 High Street, MSC #19, Plymouth, NH 03264**

Phone (603) 535-2338; Toll Free (877) 846-5755; Fax (603) 535-2627; [psu-sfs@plymouth.edu](mailto:psu-sfs@plymouth.edu); [go.plymouth.edu/aid](http://go.plymouth.edu/aid)